

finance

bank enhances efficiency, customer service

In banking, completing processes must be consistent and well-documented. A bank uses Issuetrak to ensure accuracy when completing workflow-related tasks, such as setting up a new customer account. Bank employees start by opening a new issue and entering the customer's information in the customized fields. From there, Issuetrak guides bank staff through a list of tasks needed to create the new account, such as assigning the account number and requesting an ATM card. Using Issuetrak ensures the bank completes every step in this important process, which improves efficiency, reduces errors, and, ultimately, enhances the customers' experience.



regional bank manages account processes

A small southwest regional bank uses Issuetrak to track all of the backend operations that support their customer bank accounts. When a customer comes in to open or close an account or send wire transfers, the tellers have them fill out the appropriate paperwork. An issue is created in Issuetrak, alerting the back office staff. Since multiple staff members may need to sign off on or validate certain aspects of the transfer, they use tasks to mark which operators are making the adjustments. This gives them a record of which staff members are approving or verifying data.



bank headquarters tracks employee-related workflows

The headquarters of a Pacific Northwest bank uses Issuetrak to manage access requests for employees. This could be when an employee is first hired, changes position, or leaves the bank. Depending on the employee's position within the bank, they need to be granted access to specific programs or files. Issuetrak allows a record to be created for each new hire, separation, or transfer. The owners of each system acknowledge whether an employee needs access granted or removed, based on the situation. All the acknowledgements can then be pulled for auditors, or anytime information is needed by management.

